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ABSTRACT

This training manual is part of Project STEPS (Sequenced Transition to Education in the Public Schools) and focuses on training participants to develop a community wide transition system. It contains an overview of the STEPS model, a description of the training materials, overhead masters, a guide for trainers in presenting visual and handout information, guidelines for time allotments, and agenda structure. The modules are designed for use over three days and cover the following: (1) overview of the STEPS Model and transition system design process; (2) the local team and effective team meetings; (3) the STEPS model components; (4) transition system development process; and (5) using the Helpful Entry Level Skills Checklist. Each module provides a list of materials needed, specification of module objectives, and a detailed guide to presenting the module content. (DB)

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Project STEPS

Sequenced Transition to Education in the Public Schools

Training Manual

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PROJECT STEPS

Training Manual

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PROJECT STEPS

Developing A Community Wide Transition System

Training Manual

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Introduction

The Project STEPS Training Manual provides materials to persons who have completed the STEPS (Sequenced Transition to Education in the Public Schools) Model Facilitator Training Session and wish to provide training on the STEPS Model. Materials are included to:

- train members of a local community in effective teams and meetings;
- train administrative teams to develop a community wide system for transition using the STEPS Model; and
- train direct service providers in assessing entry level skills of children moving from preschool to kindergarten or primary programs using the Helpful Entry Level Skills Checklist (Rev. Ed.).

This Project STEPS Training Manual contains an overview of the STEPS model, description of training materials, overhead and handout masters, a guide for trainers in presenting visual and handout information, guidelines for time allotments, and agenda structure.

The modules are designed for use over three days, although some modules can be used separately or modified for shorter training sessions. The modules included are as follows.

Module 1 Overview of the STEPS Model and Transition System Design Process

Module 2 The Local Team and Effective Team Meetings

Module 3 The STEPS Model Components

Module 4 Transition System Development Process

Module 5 Using the Helpful Entry Level Skills Checklist

THE STEPS MODEL

The STEPS Model is a model that relies heavily on a "team approach" to training. Because of the interagency nature of transition and the process oriented approach of the STEPS model, specific steps must be taken during the training session to ensure understanding from participants not only of the components that are the focus of the training session, but of the process of developing a "system" for transition. Therefore, the STEPS Training Model (Figure 1) incorporates team building, assessment of current practices, barrier identification, recommended transition practices, prioritization, work plan development and implementation into a training process that ultimately leads to community wide transition system development.

The STEPS Model can provide local communities with information and a process for addressing transition on a community wide basis. The purpose of the training is to:

1) build the capacity of the local team to work together;
2) provide a mechanism for assessing the current transition needs and structures within the community;
3) provide information and strategies for facilitating transition for administrators, direct service providers, families and children; and
4) provide information and materials helpful in planning for the development of a transition system.

TRAINING MATERIALS

Materials necessary for the STEPS training session include the following:

Individual Participant Materials

- Training Module Handouts Notebook (1 per participant)
  ***Note: Sections 6 - 8 of the Handout Notebook is included for states to add state specific information, legal requirements and supplemental information.

Team Folders

Resources:

- Facilitation Packet for the Development of a System for the Transition for Families and Their Children (Facilitation Packet) (1 "Copy" and 1 "Record").
  ***Note: Some states have elected to give each participant a copy of the Facilitation Packet. If you choose to do this, one "official copy" should go in the team folder.
- Community Transition Team Work Plan (NCR Forms)
- Assessment of Current Transition Practices and Transition System Development Plan (ACTP/TSDP)

Handouts:

- Groundrules for Brainstorming
- Groundrules for Discussion
- Group Groundrules
- Casting Call
- Interagency Structure
- How Decisions Get Made

There are a number of other materials developed by Project STEPS that are used to facilitate transition system design. The trainer and/or participants can choose which of these materials to include. For participants who wish to be trained in completing the Helpful Entry Level Skills Checklist (Rev. Ed.) and Instructional Strategies, a complete list of materials necessary is provided in Module 5. It is also helpful to provide samples of products, policies and procedures that have been developed by communities that have already attended the training session and have begun implementation of the STEPS model. A sample packet is available from Project STEPS for states who have not gathered their own.

DISTRIBUTION OF PROJECT STEPS MATERIALS

It is the desire of Project STEPS to distribute materials developed through the project as far as possible. To do this, the project strives to provide high quality materials at the lowest cost possible. All materials are copyrighted. However, as per the U.S. Copyright Act of 1976, Doctrine of Fair Use, you may feel free to make a single copy of any page, chapter, table or diagram for use in training or for teaching purposes. A copy of the handout Distribution of Project STEPS Materials should be included for participants in all STEPS training sessions. In addition, the Project STEPS Order Form for Project STEPS materials is included in this introductory section of the Training Manual.

USING THE PROJECT STEPS TRAINER'S MANUAL

KEY

- Team Folder
- Team Planning Activity
- Group Activity or Exercise
- Facilitation Packet
- Handout Notebook

Each training module or component has a description of the content covered, applicable Project STEPS materials and page numbers and relevant overheads. A trainer's agenda is included with each module that provides information on the amount of time necessary, subjects covered and handouts used.

Overheads for each section are coded with an "O" and a letter and number that represent the module/section and order in which the overheads are presented. For example, O-M3-A1 corresponds with Module 3, Administrative Section, Overhead #1. Handouts for each section are referenced by title.

To further ease preparation for the training, the following items are also included.

Confirmation Letter	A sample confirmation letter is provided which includes information to help prepare participants for the STEPS Training.
Agenda	An agenda is provided that includes the training objectives, specific time frame and content for the three-day training.
Training Worksheet	A worksheet is provided as an aide for training preparation.
Evaluation Form	An evaluation form for assessing the training and whether training objectives have been met is included. A summary of the evaluations should be sent to the Project STEPS office for review.

TRAINING LOGISTICS

Who? The STEPS Model training session is designed to provide opportunities for agencies serving young children with disabilities to develop collaborative agreements and procedures for the transition of children between and among the various agencies. Team makeup will be unique to each community, yet some agencies that are generally represented include the local education agency, Head Start, infant toddler programs, child care agencies, health agencies and family members.

Where? When providing trainings that have a team focus, the set up of the training room or area is important to the success of the training. Several factors must be considered prior to training.

- The team must sit together. This sounds simple, but at times the team members do not know each other and will not sit at the same table or even in the same area as other team members. Instead of having to move team members once they have seated themselves, the room should be set up with team names on team tables.

- The table arrangements must facilitate group discussions and participation by all team members in team activities. Participants also need room to lay out materials. Tables must be far enough away from each other so that discussions at one table do not disturb another team's discussion. When possible, separate break out rooms for each team are optimal.

- Because of the intense nature of the transition training, participants must feel comfortable. Participants should be told in advance to wear comfortable clothing. If possible, chairs should be comfortable to sit in throughout three days of training. The temperature should be regulated and the room should be well lit. In addition, participants need a clear, unobstructed view of all audio visual equipment used.

- Group size should be limited to approximately 30 - 40 participants and no more than 4 teams. Limiting the size of the training will help the trainer to provide individualized attention to the specific concerns of the teams attending.

- It is helpful for each team to have a flip chart stand and paper or storyboard and cards. Check with the training facility management to make sure there is sufficient wall space to hang team materials and that tape can be used on the walls.

TRAINING NOTIFICATION

Project STEPS staff are available for technical assistance for those trained to use the Project STEPS Training Manual. Prior to training, the Training Notification Form should be completed and returned to the Project STEPS office. Completion of this form will ensure technical support to the trainer.

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Level Skills Checklist

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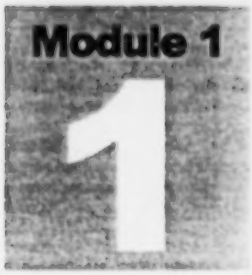
AVERY READY INDEX



Overview of the STEPS Model and Transition System Design Process

MATERIALS NEEDED

Project STEPS Orientation Packet, Assessment of Current Transition Practices and Transition System Development Plan, Facilitation Packet, Module Handout Notebook - Module 1

KEY

- Team Folder
- Team Planning Activity
- Group Activity or Exercise
- Facilitation Packet
- Handout Notebook

MODULE 1 OBJECTIVES

Participants will:

- be provided with an opportunity to become familiar with the other participants and members of their team;
- be provided with information on the history of Project STEPS;
- be provided with a general overview of transition;
- have a general understanding of the key elements in transition system design;
- identify current barriers to effective transition within the community; and
- have an opportunity to develop a tentative transition definition and vision.

MODULE 1 CONTENT

Approximate Presentation Time: 2 ½ hours

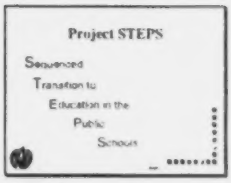
After a general overview of the training agenda and materials, the training session should begin with an activity that provides an opportunity for the participants to become familiar with each other. You may use the suggested activity or one of your own.

Allow 30 minutes for introductory activity.

Activity: Have each participant make a paper hat. On the hat they should draw pictures that describes who the person is at home, at work and in the community. Each team of participants can share their information with the team, then briefly introduce themselves and something new they learned about their team members to the whole group.

Allow 45 minutes for presentation of overview and systems information.

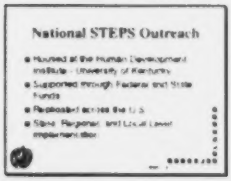
Introduce the module by providing an overview of the STEPS model.



O-M1-1

Project STEPS Orientation Packet

The information we re going to cover now can be found in the Project STEPS Orientation Packet and your Handout Notebook - Module 1.



O-M1-2

Project STEPS began as a demonstration model funded through the U.S. Department of Education in 1984. It has since been replicated through several Outreach grants in a number of states and local communities across the country. The model works with a variety of early childhood agencies at a state, regional and local level to develop state and community wide transition systems for children birth to eight.

Notes:

Transition Overview

O-M1-3

Can you tell me what transition is?

So transition can be summarized as movement or change from one environment to another.

Notes:

Ask the participants to generate a list of the types of transitions children and families experience between birth and age 8.

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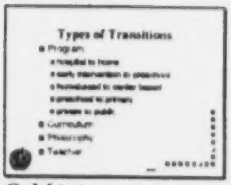
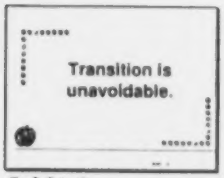


O-M1-4

Present overhead and compare lists.

Notes:

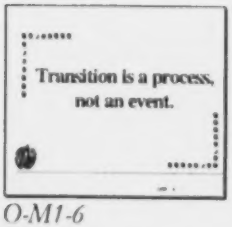


O-M1-5

What we know abut transition is:

Transition is unavoidable, we can't chose whether to transition children.

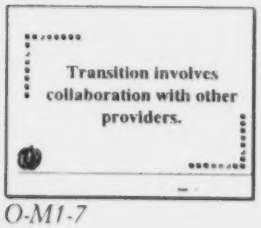
Notes:



O-M1-6

Successful transitions involve a series of events strategically planned or a process, not single transition events.

Notes:

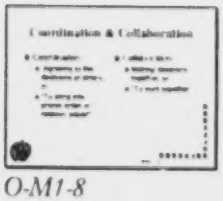


O-M1-7

Transition across agencies must involve collaboration with other providers.

Notes:

Ask participants to identify the differences between coordination and collaboration?



O-M1-8

Present overhead and compare lists.

Notes:

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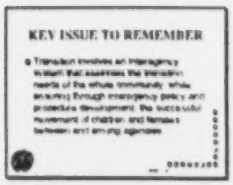


O-M1-9

Throughout the remainder of this training, we will focus on transition in the context of systems. We will leave here understanding that: Transition involves an interagency system that assesses the transition needs of the whole community, while ensuring through interagency policy and procedure development, the successful movement of children and families between and among agencies.

Notes:

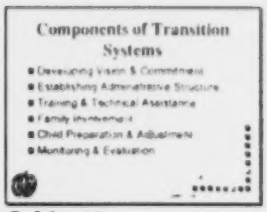
Thinking About Transition in a New Way

Developing A Community Wide Transition System Using the STEPS Model

Flowchart

Over the next three days we are going to discuss using a systems approach to address transition on a community basis. The process we will use is depicted in the flowchart in your Module 1 handouts.

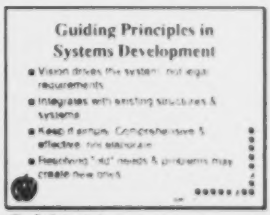
Notes:



O-M1-10

If we are to address transition in the context of systems, we will need to understand what the components of successful transition system development are. These include. . . **(present from overhead).**

Notes:



O-M1-11

We also need to understand what the guiding principles are in transition systems development. These include… **(present from overhead).**

Notes:

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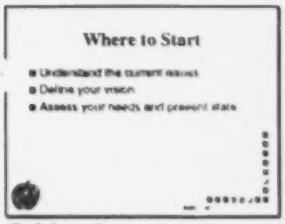


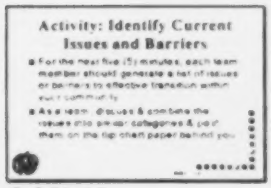
O-M1-12

Now where do we start this process? **(present from overhead)**

Notes:

Allow 30 minutes for Barrier Activity

Activity: For the next 5 minutes, individually, each team member should generate a list of issues or barriers to effective transition within their agency and community onto post-it notes or index cards.


Activity: Identify Current Issues and Barriers
For the next five (5) minutes, each team member should generate a list of issues or barriers to effective transition within your community.
As a team discuss & combine the issues into similar categories & post them on the flip chart paper behind you.

O-M1-13

The team should then be given 25 minutes to discuss and combine the issues into similar categories and post them on the flip chart into the component area (administration, staff, family, child) that best describes who the barrier affects most. You can use index cards or have them work directly on the flip chart.

Notes:

Allow 15 minutes for presentation of an overview of vision development

Assessment of Current Transition Practices and Transition Systems Development Plan

Assessment of Current Transition Practices and Transition Systems Development Plan, and Casting Call

Facilitation Packet

Now that we understand what some of the issues and current barriers are, we are ready to move on to deciding what we want to have in place when our work is done. That is called the "Vision."

In your team folder pull out your "record" copy of the Facilitation Packet, pages 12 - 13. **(provide an explanation of the vision development process)** You also have a copy in your Handout Notebook.

The next activity will require some reporting back from the groups. In order to do this, we must assign some roles and responsibilities within the team. In your team folder pull out your "Casting Call" Worksheet. **(provide a brief explanation of the casting call)**

Notes

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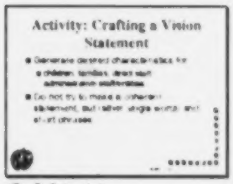
3 minutes

As a team, complete the casting call to determine who will take specific responsibilities during this training as listed on the casting call.

Notes:

Allow 30 minutes for scope and vision development

As part of the vision process, you should first determine the scope of the system and record your scope on the Assessment of Current Transition Practices and Transition System Development Plan. **(provide a brief explanation of the scope)**



O-M1-14

Once that is finished, your team should complete page 14 in the Facilitation Packet to determine the desired characteristics of the transition system you are now designing. These characteristics can then be consolidated into a "vision statement" that you should record on the flip chart paper and the Assessment of Current Transition Practices and Transition System Development Plan. This process may take time and revision. You may want to use pencil for recording so you can make changes.

Notes:

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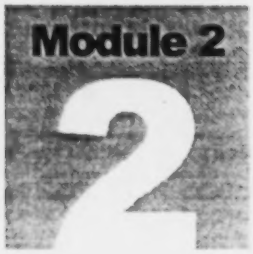
Trainer's Agenda - Module 1

Overview of the STEPS Model and Transition Systems Design Process

Time Allotted	Topic	Materials	Overhead/ Handouts
30 min.	**Group Introductions** - Provide an opportunity for team members to become acquainted.	Trainer selected materials	
45 min.	Provide a presentation of STEPS Model.	Orientation Packet	O-M1-1 O-M1-2
	Provide a overview of what an effective transition is for children and families.	Handout: *Transition Overview*	O-M1-3 to O-M1-9
	Discuss the elements of effective transition systems.	*Thinking About Transition in a New Way* *Developing a Community Wide Transition System*	Handout Flowchart O-M1-10 O-M1-11 O-M1-12
30 min.	**Activity** - Teams identify current barriers related to transition in their community.	Flip Chart or Story Board Materials	O-M1-13
15 min.	Present information on how and why a community should develop a vision statement.	*Facilitation Packet*, pages 12-13 Team Packet and Handout - *ACTP/TSDP*	*Facilitation Packet* pages 12-13
3 min.	**Activity** - To prepare for the remainder of the training, each community team will complete a casting call to determine roles throughout the training	Team Folder: *Casting Call*	*Casting Call*
30 min.	**Activity** - Community teams begin to generate characteristics of their transition system, including scope and vision.	*ACTP/TSDP* *Facilitation Packet*, page 13	O-M1-14



The Local Team and Effective Team Meetings

MATERIALS NEEDED

Team Packet, Module Handout Notebook - Module 2, Facilitation Packet

KEY

- Team Folder
- Team Planning Activity
- Group Activity or Exercise
- Facilitation Packet
- Handout Notebook

MODULE 2 OBJECTIVES

Participants will:

- be provided with information on the characteristics of an effective team;
- be provided with information on the stages of team development;
- be provided with information on how to effectively conduct team meetings;
- analyze individual teams roles; and
- be provided with opportunities for team building;

MODULE 2 CONTENT

Presentation Time: 3 hours

The module should begin with a team building activity. You may use the suggested activity, come up with one of your own or contact the HRD Quarterly (1-800-637-4533) which provides a variety of team adventures that can be purchased. The overall goal of the team building activity should be to provide opportunities for the team to work together to solve a mutual problem or achieve a goal.

Allow 1 hour for team building activity
Before you begin the activity, choose an observer for each team. They should complete the observer guidelines form included with this manual.

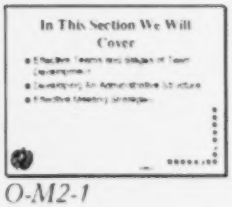
Activity: Give each team of participants one box of toothpicks and one bag of small marshmallows. The team should be given the following directions.

> Your group has become stranded on an uninhabited island in the tropics. No one knows where you are located so your chances of rescue are minimal. You do however have some materials which you can use to build an escape craft. Using these materials, build something you can use to get off the island. You may use all of the materials given to you, but cannot add to the materials. You will have an observer, who will give you feedback once you complete your assignment. You have thirty minutes.

✍ *Notes:*

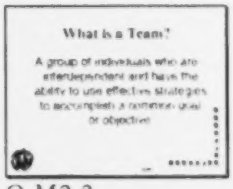
After the activity is completed, observers should share with the teams based on the observation form. The group can then talk about the activity.

🕐 Allow 2 hours for presentation of Module 2 content



O-M2-1

> The next module we will be working through is Module 2. This module focuses on helping us establish the Interagency Structure we need to put out transition system in place. In this module we will be covering the following items (**present from overhead).**

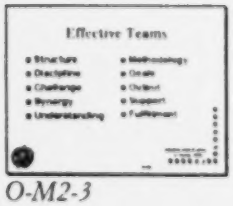


O-M2-2

> Now we are going to begin a discussion of teams and effective team meetings. You will need the following handouts.
>
> 📄 Module Handout Notebook - Module 2
>
> The first thing we need to understand is the definition of team. **(present from overhead).**

✍ *Notes:*

📄 Effective Teams



O-M2-3

> The next thing we need to understand is what makes an effective team. Effective teams have: (**present from overheads)**

✍ *Notes*

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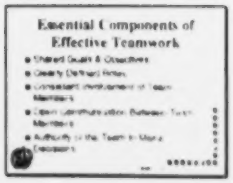
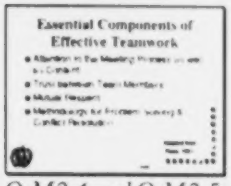


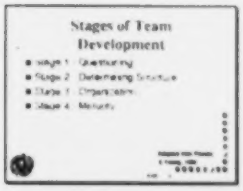


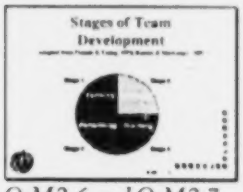
O-M2-4 and O-M2-5

Essential Components of Effective Team Work

In summary effective teams have essential components. These include: **(present from overheads)**.

Notes



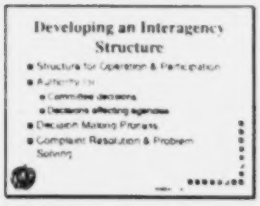


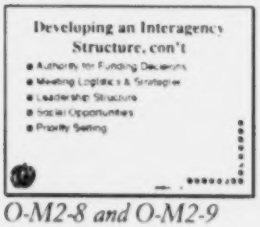
O-M2-6 and O-M2-7

Team Development Stages

In addition, teams goes through four stages of development. These include: **(present from overheads)**

Notes





O-M2-8 and O-M2-9

Now that we understand a little about how teams are formed and what they need to be effective, we need to begin to develop an Interagency Structure for the development of transition system. When developing an Interagency Structure, the following items must be negotiated and formalized. **(present from overhead)**

Notes

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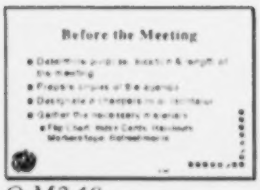
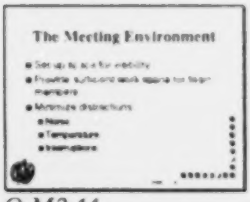
Holding Effective Meetings



O-M2-10

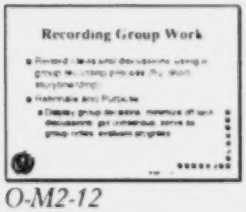
A large part of our time together as teams is spent in team meetings. There are several things we can do before and during meetings to make them more effective. The first things to do relate to preparing for the meeting. **(present from overheads)**

Notes



O-M2-11

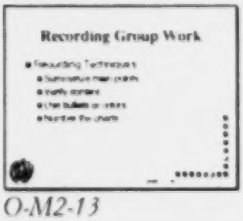
An important part of making meetings successful relies on how we are able to manage the environment. **(present from overheads)**



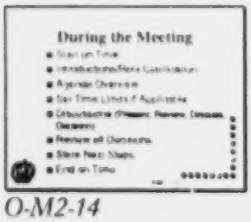
O-M2-12

We must also use effective strategies and methods for recording the work of the group. **(present from overheads)**

Notes



O-M2-13



O-M2-14

During the meeting, the process we use determines our success. We should: **(present from overheads).**

Notes

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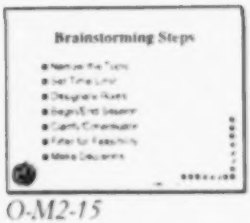
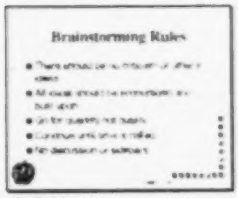
Brainstorming



O-M2-15

There are several techniques we can use during the meeting to generate ideas quickly and efficiently. One of these is Brainstorming. **(present from overheads)**

Notes



O-M2-16

When we use brainstorming, it is important that we set groundrules for how the session is going to be conducted. **(present from overheads)**

Notes

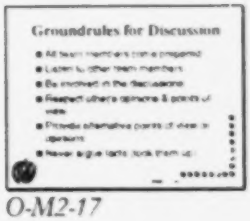
5 minutes

Groundrules for Brainstorming

In your team packets you will find a worksheet called Groundrules for Brainstorming. As a team take 5 minutes to record groundrules you would like to use during brainstorming sessions within your team.

Notes

Discussions



O-M2-17

Teams spend a lot of time in meetings discussing. We can make our discussions more effective by: **(present from overhead)**

Notes

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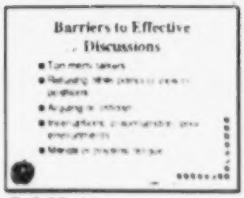


O-M2-18

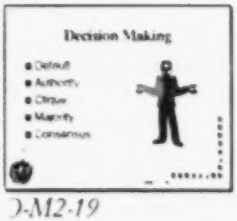
When setting groundrules as a team, we should keep in mind that there are several barriers to effective discussion, These barriers can be used to help us generate our groundrules. **(present from overhead)**

5 minutes

Ground Rules for Discussion

In your team packets you will find a worksheet called Ground Rules for Discussion. As a team take 5 minutes to record groundrules you would like to use during discussion sessions within your team.

Decision Making



O-M2-19

Teams also must make decisions on a regular basis. There are a number of decision making processes you can use within you team. These include: **(present from overhead)**

Notes

5 minutes

Interagency Structure Worksheet

In your team packets you will find a worksheet called Interagency Structure. As a team take 5 minutes to identify the types of decision making methods your team will use and when you will use them. Record this information on your worksheet.

Notes

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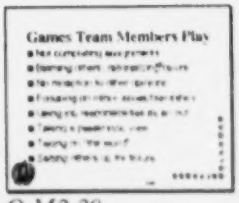
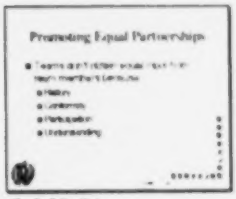


O-M2-20

There are several behaviors that can either enhance or inhibit the progress of the team. These include: **(present from overheads).**



O-M2-21

One of the main focuses of interagency teams should be on promoting equal partnerships among members. This can be accomplished by: **(present from overheads)**

Notes

1/2 hour for team planning

Assessment of Current Transition Practices and Transition Systems Development Plan

In your team packets you will find a copy of the Assessment of Current Transition Practices and Transition Systems Development Plan , which you have used to record your transition scope and vision.

As a team take 30 minutes to record structural activities you have formalized over the last hour and develop a timeline for when you will complete the other structural considerations included on this page. Your team should have all structural issues formalized within the next three months and before you begin working on other goals and activities.

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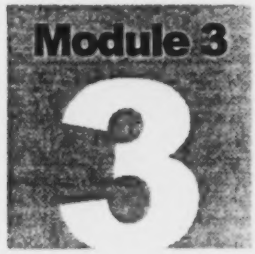
Trainer's Agenda - Module 2

The Local Team and Effective Team Meetings

Time Allotted	Topic	Materials	Overhead/ Handouts
1 hour	**Activity** -Provide an activity that allows the team an opportunity to build their capacity to work together as a team. The activity should provide enough information to build the remaining Module 2 content around.	Trainer Selected Team Building Activity	Trainer Selected
1.5 hours	Begin with an overview of what will be covered in Module 2.	*Developing an Interagency Structure*	O-M2-1
	Discuss the role of teams in developing an Interagency Structure to support transition systems design.	*Effective Teams* *Essential Components of Effective Teamwork* *Team Development Stages*	O-M2-2 to O-M2-7
	The next section will focus on developing an interagency structure.	*Facilitation Packet*, pages 20-25 (also a copy in Handout Notebook)	O-M2-8 O-M2-9
	The next section will focus on how to conduct effective team meetings.	*Holding Effective Meetings*	O-M2-10 to O-M2-14
(5 min.)	**Activity** - Each team will identify their groundrules for brainstorming.	*Brainstorming* Team Folder: *Groundrules for Brainstorming*	O-M2-15 O-M2-16
(5 min.)	**Activity** - Each team will identify their groundrules for discussion.	*Discussions* Team Folder: *Groundrules for Discussion*	O-M2-17 O-M2-18
(5 min.)	**Activity** - Each team will identify the decision making methods they will use during meetings and activities.	*Decision Making* Team Folder: *Interagency Structure Sheet*	O-M2-19
	End the module with an overview of obstacles to effective meetings.		O-M2-20 O-M2-21
30 min.	**Activity** - The team will spend time planning for the development of their Interagency Structure.	*ACTP/TSDP*	



The STEPS Model Components

MATERIALS NEEDED

Team Packet, Module Handout Notebook (Module 3), Facilitation Packet

KEY

- Team Folder
- Team Planning Activity
- Group Activity or Exercise
- Facilitation Packet
- Handout Notebook

MODULE 3 OBJECTIVES

Participants will:

- be provided with information on transition best practices in the areas of administration, staff and family involvement, and child preparation for the transition process.

MODULE 3 CONTENT

Total Presentation Time: 6 ½ hours

Module 3 is broken into 5 sections, each of which is presented below.

Module 3 - Section 1 - Assessment of Current Transition Practices

30 minutes

Section Objectives:

- Participants will be provided with an opportunity and tools to assess the current status of transition practices within the community.

Module 3, Section 1

Section 1 of this module focuses on assessing the current status of transition procedures within the community. Directions for completing the Current Status section of the Assessment of Current Transition Practices and Transition System Development Plan should be presented to each team. Once completed, the current status section will be referred to by teams when they begin to develop an action plan.

Assessment of Current Transition Practices and Transition System Development Plan

Assessment of Current Transition Practices and Transition System Development Plan

Refer each team to the form in the team packet and Module 3, Section 1 of handout notebook.

> As a team you will complete the Current Status Section of the Assessment of Current Transition Practices and Transition System Development Plan using the following criteria:
> Answer "Yes" if:
> Everyone on the team has worked to develop an interagency process to address the issue;
> - The process has been formalized through written interagency procedures, policies or agreements; and
> - The process is working effectively for all agencies.
>
> If you have not completed an activity as a team, but some items are in place, mark Partial and describe what is currently in place.

After the activity is completed, teams can be offered an opportunity to discuss their findings with the group as a whole.

Module 3 - Section 2 - Administrative Issues

2 hour, 30 minutes

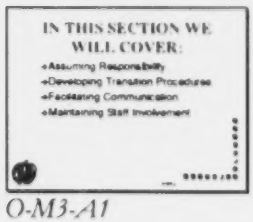
Section Objectives:

- Participants will be provided with strategies for addressing administrative issues in transition planning.

Module 3, Section 2

During the presentation of the following section of Module 3, it will be critical that the trainer pulls from his/her own experiences to provide specific examples of how communities have addressed each of the objectives. Specific examples from other communities can be included in the State Specific Sections of the Handout Notebook and/or pulled from the participants.

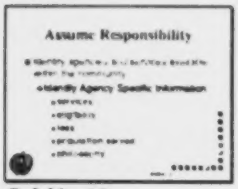
1 ½ hours for presentation



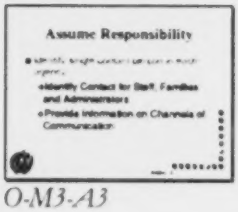
O-M3-A1

> During this section of the training we will be discussing the following administrative issues: **(present from overhead)** Handouts for this section are included in Module 3, Section 3 of your Handout Notebook.

Notes



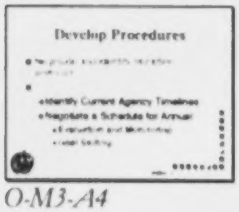
O-M3-A2


Assume Responsibility
Identify Contact for Staff, Families and Administrators
Provide Information on Channels of Communication

O-M3-A3

The next area we address related to administration is responsibilities. A key point to bring out in this section is an understanding of the services provided by agencies involved in the transition process. This information provides the groundwork for all negotiations and policies and procedures to be developed in the future. These include: **(present from overheads)**

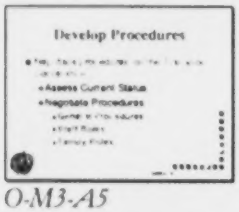
✍ *Notes*



O-M3-A4

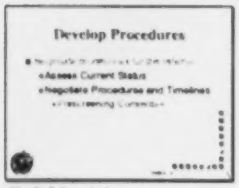
📖 *Facilitation Packet - Pages 26-65*

Another important activity to begin with is the identification of broad-based timelines for evaluating and monitoring activities we have implemented and choosing and reprioritizing goals and activities for the team. This should occur at a minimum on an annual basis.



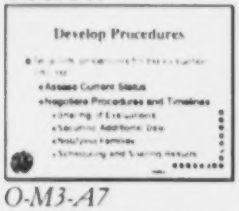
O-M3-A5

The next area we address related to administration is procedures. For each step in the transition process, the current status of activities must be assessed and specific procedures must be negotiated and formalized. These include: **(present from overheads)**



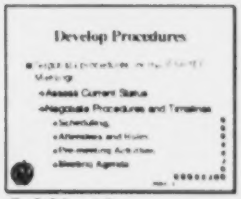
O-M3-A6

When you begin to address specific procedures, you will find specific recommendations for addressing procedures related to referral, child find, evaluations, placements, etc., in the Facilitation Packet - pages 26-65. (Direct participants through an overview of these sections in the Facilitation Packet)



O-M3-A7

✍ *Notes*

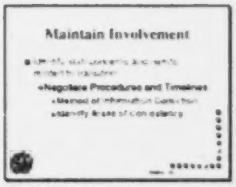


O-M3-A8

O-M3-A9

The next area we address related to administration is to facilitate communication through follow-up activities. **(present from overheads)**

Notes



O-M3-A10

The next area we address related to administration is maintaining staff and family involvement in the transition process. **(present from overhead)**

Notes

O-M3-A11

1 hour for team planning

Assessment of Current Transition Practices and Transition Systems Development Plan

In your team packets you will find a copy of the Assessment of Current Transition Practices and Transition Systems Development Plan, which you have used to record your transition scope and vision.
As a team take 45 minutes to discuss each of the activities under the administrative and interagency committee portions of the ACTP/TSDP. In the column titled **"Chosen for Implementation,"** as a team place a check mark in the "yes" column for those activities which would enhance transition within the community. You should refer back to your Current Status section to determine activities you have identified as in need of improvement. If there is an activity your team does not wish to address, place a check in the "no" column.

Module 3 - Section 3 - Staff Involvement Issues

1 hour

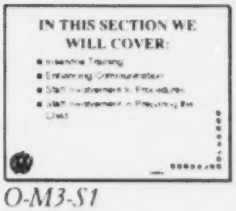
Section Objectives:

- Participants will be provided with strategies for addressing staff issues in transition planning.

Module 3, Section 3

During the presentation of the following section of Module 3, it will be critical that the trainer pulls from his/her own experiences to provide specific examples of how communities have addressed each of the objectives. Specific examples from other communities can be included in the State Specific Sections of the Handout Notebook and/or pulled from the participants.

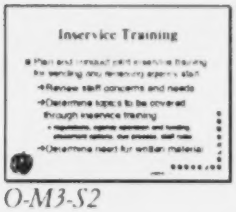
40 minutes for presentation



O-M3-S1

During this section of the training we will be discussing the following staff issues: **(present from overhead)**

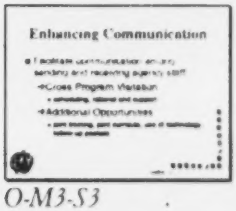
Notes



O-M3-S2

The first staff issue to be addressed involves in-service training opportunities for sending and receiving agency staff.

Notes

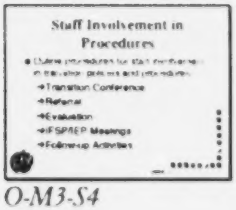


O-M3-S3

The next areas we will address relate to enhancing communication between staff from different agencies. **(present from overheads)**

Teacher Observation Guidelines

One form which has been developed to assist teachers with cross program visitations is the Teacher Observation Guidelines. **(explain uses)**



O-M3-S4

After procedures have been negotiated and formalized for the transition process, the procedures will need to be outlined for direct line staff. **(present from overheads)**

Notes

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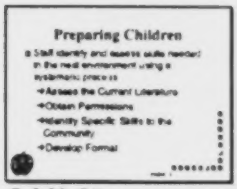
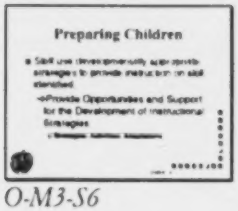

Preparing Children
Staff identify and assess skills needed in the next environment using a systematic process
Assess the Current Literature
Obtain Permissions
Identify Specific Skills in the Community
Develop Format

O-M3-S5



O-M3-S6

The final area we address related to staff is their understanding of entry level skills and the role of those skills in successful transitions. **(present from overhead)**

Notes

Transition Activities for Preschool Teachers

In your Handout Notebook you will find some strategies and ideas for specific transition activities for preschool teachers. **(explain)**

Notes

20 minutes for team planning

Assessment of Current Transition Practices and Transition Systems Development Plan

In your team packets pull out the Assessment of Current Transition Practices and Transition Systems Development Plan, which you have used for administrative planning.

As a team take 20 minutes to discuss each of the activities under the staff portions of the ACTP/TSDP. In the column titled "**Chosen for Implementation,**" as a team place a check mark in the "yes" column for those activities which would enhance transition within the community. You should refer back to your Current Status section to determine activities you have identified as in need of improvement. If there is an activity your team does not wish to address, place a check in the "no" column.

Module 3 - Section 4 - Family Involvement Issues

1 hour, 15 minutes

Section Objectives:

- Participants will be provided with strategies for addressing family issues in transition planning.

Module 3, Section 4

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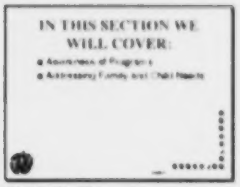
During presentation of the following section of Module 3, it will be critical that the trainer pull from his/her own experiences to provide specific examples of how communities have addressed each of the objectives. Specific examples from other communities can be included in the State Specific Sections of the Handout Notebook and/or pulled from the participants.

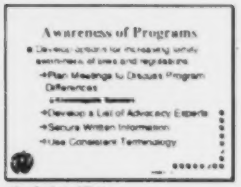
1 hour for presentation



O-M3-F1

During this section of the training we will be discussing the following family issues: **(present from overhead)**

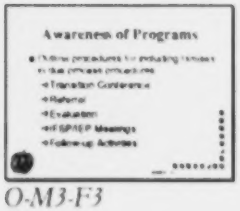
Notes


Awareness of Programs
Plan Meetings to Discuss Program Differences
Develop a List of Advocacy Experts
Secure Written Information
Use Consistent Terminology

O-M3-F2

The first area of need for families involves an understanding of the programs available in the community. This begins with understanding the differences in programs. **(present from overhead)**

Notes



O-M3-F3

Families must also have information on how they can be involved in due process procedures. **(present from overhead)**

Notes

Parent Report Form

One example of how to ensure that family members are prepared for and are comfortable with active involvement in the placement meetings is to assist them with completion of a Parent Report Form. **(explain uses)**

Models of Family Linkages

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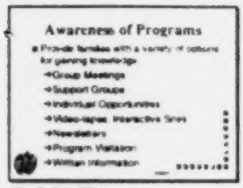


O-M3-F4

Because of the various needs of families, we must offer information through a variety of formats. These formats include: **(present from overhead)**

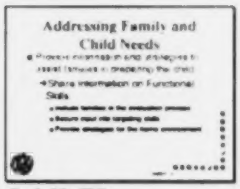
Parent Observation Guidelines

When discussing program visitation for families, reference the Parent Observation Guidelines. **(explain possible uses)**

Family Transition Checklist

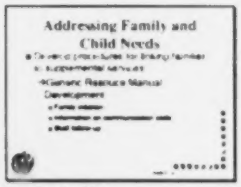
In your Handout Notebook, you will find some strategies and ideas for specific transition activities for families. **(explain)**

Notes



O-M3-F5

The next area we address related to families is assisting families in preparing the child for the transition process. **(present from overhead)**



O-M3-F6

Families must also be provided information on accessing supplemental services. **(present from overhead)**

Project STEPS Access Manual Sample Page

One booklet which has been developed to assist families with accessing supplemental services is the ACCESS Manual. **(explain uses)**

Notes

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15 minutes for team planning

Assessment of Current Transition Practices and Transition Systems Development Plan

In your team packets pull out the Assessment of Current Transition Practices and Transition Systems Development Plan, which you have used for administrative planning and staff planning.

As a team take 15 minutes to discuss each of the activities under the family portions of the ACTP/TSDP. In the column titled "**Chosen for Implementation,**" as a team place a check mark in the "yes" column for those activities which would enhance transition within the community. You should refer back to your Current Status section to determine activities you have identified as in need of improvement. If there is an activity your team does not wish to address, place a check in the "no" column.

Module 3 - Section 5 - Child Preparation Issues

1 hour

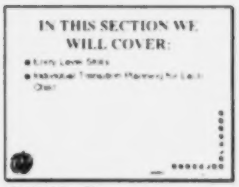
Section Objectives:

- Participants will be provided with strategies for addressing child preparation issues in transition planning.

Module 3, Section 5

During the presentation of the following sections of Module 3, it will be critical that the trainer pulls from his/her own experiences to provide specific examples of how communities have addressed each of the objectives. Specific examples from other communities can be included in the State Specific Sections of the Handout Notebook and/or pulled from the participants.

30 minutes for presentation



O-M3-C1

During this section of the training we will be discussing the following child preparation issues: (**present from overhead)**

Notes

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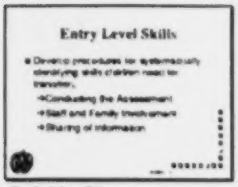


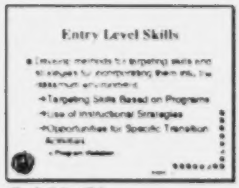
O-M3-C2

The first child issue to be addressed involves entry level skills. During this section of the training we will discuss the process for identifying appropriate entry level skills for your community. **(present from overheads)**

Helpful Entry Level Skills Checklist

One assessment which has been developed to assist staff with identification of entry level skills is the Helpful Entry Level Skills Checklist. **(explain uses)**

Notes



O-M3-C3

The next area we address related to the child is the targeting of skills and use of instructional strategies which will facilitate the development of skills targeted for intervention on the child's IEP or IFSP. **(present from overhead)**

Instructional Strategies Information Sheet

One booklet which has been developed to assist staff with instructional strategies related to transition skills is the STEPS Instructional Strategies Manual which correlates with is the Helpful Entry Level Skills Checklist. **(explain uses)**

Notes

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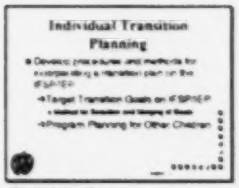
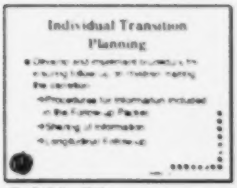


O-M3-C4

The next child issue to be addressed involves planning for each child related to transition. Transition planning should incorporate skills identified through formal and informal assessment as helpful or critical for the child's successful transition into a new environment. **(present from overhead)**

✍ *Notes*



O-M3-C5

The final area we address related to the child is follow-up activities. **(present from overheads)**

Sample Follow-up Packet

The follow-up packet can contain anything the community feels will be valuable to the receiving teacher. One item you may want to consider is a letter of introduction. **(explain uses)**

✍ *Notes*

30 minutes for team planning

Transition Systems Development Plan

In your team packets pull out the Assessment of Current Transition Practices and Transition Systems Development Plan, which you have used for administrative, staff and family planning.

As a team take 30 minutes to discuss each of the activities under the child portions of the ACTP/TSDP. In the column titled "**Chosen for Implementation,**" as a team place a check mark in the "yes" column for those activities which would enhance transition within the community. You should refer back to your Current Status section to determine activities you have identified as in need of improvement. If there is an activity your team does not wish to address, place a check in the "no" column. In your team packets pull out the Transition Systems Development Plan, which you have used for planning.

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Trainer's Agenda - Module 3, Section 1

Assessment of Current Transition Practices

Time Allotted	Topic	Materials	Overhead/ Handouts
30 min.	Team should assess the current status of transition practices using the *Assessment of Current Transition Practices/ Transition System Development Plan.*	*ACTP/TSDP* Official copy in Team Folder	Use a flip chart or overhead to list criteria for completion

Trainer's Agenda - Module 3, Section 2

Administrative Issues

Time Allotted	Topic	Materials	Overhead/ Handouts
1.5 hour	Provide an overview of administrative issues which should be considered for inclusion the transition systems design.	Handout: *Administrative Issues Module 3, Section 2*	O-M3-A1
	Assuming Responsibility		O-M3-A2 O-M3-A3
	Developing Procedures	*Facilitation Packet*, pages 26-65	O-M3-A4 O-M3-A5 O-M3-A6 O-M3-A7 O-M3-A8
	Facilitate Communication		O-M3-A9
	Maintain Staff and Family Involvement		O-M3-A10 O-M3-A11
1 hour	**Activity -** The team will spend time planning appropriate administrative and interagency activities for consideration in their system design.	*ACTP/TSDP - Administrative Section*	

Trainer's Agenda - Module 3, Section 3

Staff Issues

Time Allotted	Topic	Materials	Overhead/ Handouts
40 min.	An overview of staff issues which should be considered for inclusion the transition systems design.	Handout: *Staff Issues Module 3, Section 3*	O-M3-S1
	Inservice Training		O-M3-S2
	Enhancing Communication	*Teacher Observation Guidelines*	O-M3-S3
	Staff Involvement in Procedures		O-M3-S4
	Staff Involvement in Preparing the Child	*Transition Activities for Preschool Teachers*	O-M3-S5 O-M3-S6
20 min.	**Activity** - The team will spend time planning appropriate staff activities for consideration in their system design.	*ACTP/TSDP - Staff Section*	

Trainer's Agenda - Module 3, Section 4

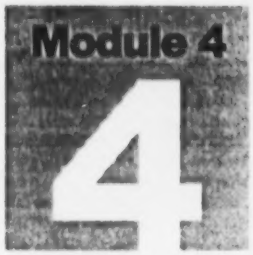
Family Involvement

Time Allotted	Topic	Materials	Overhead/ Handouts
1 hour	Provide an overview of staff issues which should be considered for inclusion the transition systems design should be provided.	Handout: *Family Issues Module 3, Section 4*	O-M3-F1
	Awareness of Programs	*Parent Report Form* *Models of Family Linkages* *Parent Observation Form* *Family Transition Checklist*	O-M3-F2 O-M3-F3 O-M3-F4
	Addressing Family and Child Needs	*Access Manual Sample*	O-M3-F5 O-M3-F6
15 min.	**Activity -** The team will spend time planning appropriate family activities for consideration in their system design.	*ACTP/TSDP - Family Section*	

Trainer's Agenda - Module 3, Section 5

Child Preparation

Time Allotted	Topic	Materials	Overhead/ Handouts
30 min.	Provide an overview of child issues which should be considered for inclusion the transition systems design.	Handout: *Child Preparation Issues Module 3, Section 5*	O-M3-C1
	Entry Level Skills	*Helpful Entry Level Skills Checklist* *Instructional Strategies Information Sheet*	O-M3-C2 O-M3-C3
	Individual Transition Planning	*Sample Follow-up Packet*	O-M3-C4 O-M3-C5
30 min.	**Activity** - The team will spend time planning appropriate child activities for consideration in their system design.	*ACTP/TSDP - Child Section*	



Transition System Development Process

MATERIALS NEEDED

Transition Systems Development Plan, Module Handout Notebook - Module 4, Team Packet

KEY

- Team Folder
- Team Planning Activity
- Group Activity or Exercise
- Facilitation Packet
- Handout Notebook

MODULE 4 OBJECTIVES

Participants will:

- prioritize activities to be implemented over the next year;
- complete an action plan for at least one of the priority areas;
- set a date for the next team meeting; and
- identify a contact person for the team.

MODULE 4 CONTENT

Presentation Time: 5 hours

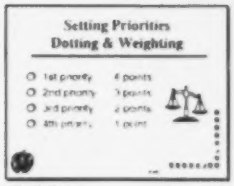
This module is designed to assist the team with understanding the planning process. Each team will begin the module by prioritizing the goals they wish to accomplish from the items they have identified on the Assessment of Current Transition Practices and Transition Systems Development Plan.

30 minutes

Assessment of Current Transition Practices and Transition Systems Development Plan

Activity: Each team will identify 10 to 15 activities they would like to begin implementing over the next year. It is important for all team members to have input into deciding which items will go on the board as possible activities.

✍ *Notes*



O-M4-1

Now we are going to prioritize these activities until we can identify 4 to 5 which will be implemented over the next year. There are several ways you can prioritize activities. I will introduce two methods. Dotting and Voting. **(present from overhead for dotting and explain voting procedures)**

✍ *Notes*

🕐 15 minutes

📂 *Interagency Structure*

Now that you have information on types of prioritizing, as a team complete the prioritizing section on the Interagency Structure Sheet in your team packet.

✍ *Notes*

🕐 30 minutes

📂 *Assessment of Current Transition Practices and Transition Systems Development Plan*

Once you have completed the Interagency Structure sheet, use the prioritizing method you have selected to prioritize the activities on your list. Identify 4 to 5 activities you will be implementing over the next year. Once they have been identified, mark it on your ACTP/TSDP by placing the numbers 1 - 5 in the upper left hand corner of the "Yes" column.

✍ *Notes*

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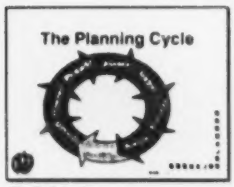


O-M4-2

⏲ 40 minutes for overview of the planning cycle and process

The Planning Cycle

We are now going to go over the planning cycle used when designing Transition Systems. **(present from overhead)**

Notes

Conflict Diagram

Conflict Diagram

As we begin planning our system, we may run into conflict among the group. In order to resolve conflict, it helps to understand the sources of conflict and the possible responses. **(present from overhead)**

Facilitation Packet

As a group, discuss methods of conflict resolution and determine the type of problem solving and conflict resolution strategies you will use as a team. Record your decision in the Facilitation Packet on Page 21, question 5.

Notes

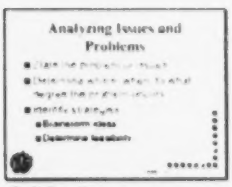
Planning Guidelines Flow Chart

The next section of the training provides a specific overview of the planning process using some of the activities selected by the group. The trainer should provide information using the following handouts as overheads.

Guidelines for the Planning Process

Guidelines for Addressing Administrative Goals/Activities

Sample Story Boarding for Informational and Process Goals



O-M4-3

If the trainer prefers to use story boarding to present the planning process, the examples can following the sample handouts on story boarding provided to participants.

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I am now going to model the planning process using some of the activities you have chosen for implementation.

Notes

Sample Community Work Plan

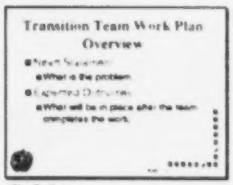
Once the trainer has modeled the process, they should demonstrate how the items discussed and decisions made during the planning activities will be used to complete the Community Transition Team Work Plan.

Community Transition Team Work Plan

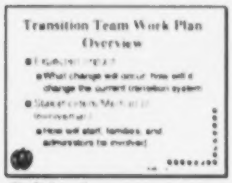
Sample Community Transition Team Work Plan

Once you have completed the planning process on one of the activities you have chosen, you can record your decisions on the Community Transition Team Work Plan. **(present from overheads)**

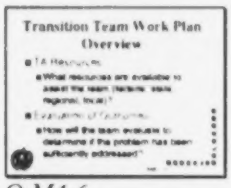
Notes



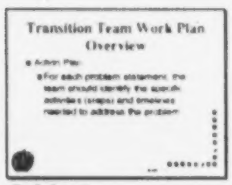
O-M4-4



O-M4-5



O-M4-6



O-M4-7

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2 hours

Community Transition Team Work Plan

Assessment of Current Transition Practices and Transition Systems Development Plan

Teams will now spend time competing the Assessment of Current Transition Practices and Transition Systems Development Plan for activities chosen for implementation and beginning the planning process for the activities selected. They should be encouraged to complete the planning process and Community Transition Team Work Plan for at least one of the activities chosen during training.

15 minutes for group sharing and closure

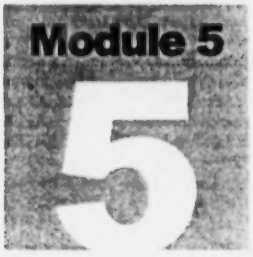
Notes

The training should close with an opportunity for the teams to share information about their planned activities.

Trainer's Agenda - Module 4

Transition System Development Process

Time Allotted	Topic	Materials	Overhead/ Handouts
30 min.	**Activity** - Each team will use the *Assessment of Current Transition Practices/Transition Systems Development Plan* and identify a list of 10 - 15 activities they would like to implement over the next year.	Team Folder: *Transition System Development Plan*	Flip chart or story board of directions.
5 min. 15 min.	**Priority Setting** - Provide brief description of methods Planning Process. **Activity** - Each team will discuss methods for priority setting and determine which methods they will use as a team.	 Team Folder: *Interagency Structure Worksheet*	O-M4-1
30 min.	**Activity** - Using the prioritizing method chosen, teams will narrow the list of fifteen items to the top 4 - 5.	Team Folder: *ACTP/TSDP* Flip Chart or Story Boards	
40 min.	Presentation and modeling of the planning cycle and process. Overview of the Team Work Plan	*The Planning Cycle* *Conflict Diagram* *Facilitation Packet*, page 21 *Guidelines for the Planning Process* *Guidelines for Addressing Administrative..* *Sample Story Board* *Sample Team Work Plan*	O-M4-2 Conflict Diagram Planning Process Flow Chart *Sample Team Work Plan* O-M4-4 O-M4-5 O-M4-6 O-M4-7
2 hours *(Minimum)*	Team Planning Time	Team Folder: *ACTP/TSDP* Community Wide Transition Team Work Plan	



Using the Helpful Entry Level Skills Checklist

MATERIALS NEEDED

Module Handout Notebook - Module 5

KEY

- Team Folder
- Team Planning Activity
- Group Activity or Exercise
- Facilitation Packet
- Handout Notebook

MODULE 5 OBJECTIVES

Participants will:

- learn how to administer the Helpful Entry Level Skills Checklist; and
- have a general understanding of how to complete a classroom matrix.

MODULE 5 CONTENT

Presentation Time: 90 minutes (1 ½ hours)

This module was designed as an optional portion of the three day STEPS training. This module can also be used as a stand alone training. When used as a stand alone training for teachers and paraprofessionals, it should be conducted in a minimum of three hours. Should you wish to conduct the stand alone training, please contact the Project STEPS office for a complete training packet and instructions.

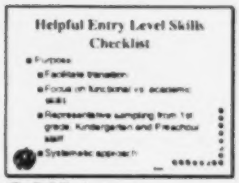
**Note to trainers: The handout and overhead masters contained in this module include all materials needed to conduct the full three hour training. However, instructions in this manual include only that information which is typically covered during the three day training (1 ½ hours).

Helpful Entry Level Skills Child Preparation Activities

Copy of Helpful Entry Level Skills Flowchart

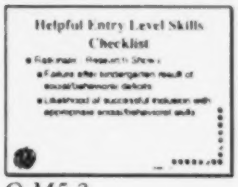
For the next 1 and ½ hours we will be learning how to complete the Helpful Entry Level Skills Checklist (HELS-R). The overall process included in preparing the child for transition is depicted in this flowchart. **(present overhead and explain)**

Users Manual for the Helpful Entry Level Skills Checklist



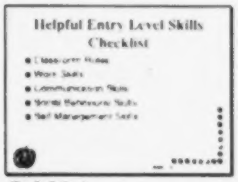
O-M5-1

I will start with an overview of the purpose, rationale and use of the Helpful Entry Level Skills Checklist. **(present from overheads)**



O-M5-2

Notes



O-M5-3

Follow the overview with a verbal description of how to use the HELS-R Checklist and matrix. Once this is completed, the trainer should model completion of the checklist using a volunteer from the audience. The trainer may choose, based on time, whether to complete all sections of the checklist, but at a minimum should complete at least two sections (i.e., classroom skills, work skills).

Helpful Entry Level Skills Checklist

Classroom Matrix

Copy of the Helpful Entry Level Skill Checklist

Now we will practice completing the checklist as a group. Can I get a volunteer to help me. **(using a volunteer, complete the pretest section of the checklist)**

In order to help users identify appropriate target skills, the Developmental Levels for Skills Included on the Helpful Entry Level Skills Checklist was developed. Participants can be instructed on how to use this manual during the section on targeting skills.

BEST COPY AVAILABLE

Helpful Entry Level Skills Checklist

Once completion has been demonstrated, participants may begin Activity 1

20 Minutes

Now that the Checklist has been explained, I am going to give you an opportunity to practice completing the checklist. If after you have practiced, you would like your checklist to be scored so that you may receive certification, please turn your checklist in to me.

Please complete the pre-test section of the assessment, and target skills in each area assessed as appropriate.

Important: Each participant should put their name and address (including phone number) on the HELS-R form that is used for this activity. All participants should be reminded not to use real names for the parents or children.

Notes

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Trainer's Agenda - Module 5

Using the Helpful Entry Level Skills Checklist & Accompanying Materials

Time Allotted	Topic	Materials	Overhead/ Handouts
1.5 hours	Presentation and overview of the use of the *Helpful Entry Level Skills Checklist.*	*Child Preparation Activities Flow Chart* *User's Manual for HELS Checklist* *HELS Checklist* *Classroom Matrix*	Flowchart O-M4-1 O-M4-2 O-M4-3 Checklist
20 min.	Each participant will complete the pre-test section of the Checklist on a child between the ages of 3 and 6.	*HELS Checklist*	Handout Activity 1

Developing A Community Wide Transition System Using the STEPS Model

Trainer's Agenda

The responsibility of the Lead Trainer is to provide "book ends." This means they will introduce and provide closure for each module, the purpose of which is to provide consistency. The Lead Trainer is also responsible for the all team planning activities related to the Assessment of Current Transition Practices and the Transition Systems Development Plan, again to provide consistency.

Lead Trainer: _____ Co-Trainer(s): _____

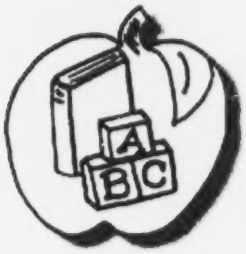
Time		Trainer
Day 1		
_____	Registration	
_____	Introduction/Training Agenda Overview Provide a general welcome and overview of the training agenda, materials, handouts, bathrooms, lunch breaks, etc. **Activity:** *Icebreaker*	Lead Trainer
_____	The Transition System Development Process *(Module 1)* STEPS Overview Transition Overview Systems Approach **Activity:** *Barriers Identification* Vision Overview **Activity:** *Definition & Vision Statement*	_____
_____	Lunch	_____
_____	Team Building/Effective Meetings *(Module 2)* **Activities:** *Team Building Activity* *Team Role Analysis* *Interagency Structure Planning*	_____
_____	Break	
_____	Assessment of Current Transition Practices *(Module 3, Section 1)*	_____
_____	Provide closure to the day's activities and discuss briefly the agenda and starting times for Day 2	Lead Trainer
_____	Adjourn Trainers will stay to debrief on the day's activities, make schedule adjustments and discuss Day 2	_____

Day 2

_____	Welcome and overview of the day will be provided	Lead Trainer
_____	Administrative and Interagency Issues *(Module 3, Section 2)* **Activity:**	Lead Trainer
_____	Break	
_____	Administrative Planning *(ACTP/TSDP)* Introduce the team planning activity	Lead Trainer
_____	Lunch	
_____	Staff Involvement Issues & Planning *(Module 3, Section 3)* **Activity:**	_____
	Planning *(ACTP/TSDP)*	Lead Trainer
_____	Break	
_____	Family Involvement Issues & Planning (Module 3, Section 4) **Activity:**	_____
	Planning *(ACTP/TSDP)*	Lead Trainer
_____	Child Preparation for the Next Environment Issues & Planning *(Module 3, Section 5)* **Activity:**	_____
	Planning *(ACTP/TSDP)*	Lead Trainer
_____	Closure for the day's activities will be provided. Trainers will stay to debrief on the day's activities, make schedule adjustments and discuss Day 3	Lead Trainer

Day 3

_____	Welcome and overview of the day's activities	Lead Trainer
_____	Overview of Priority Setting *(Module 4)*	_____
_____	Break	
_____	**Activity:** *Prioritization Activity*	_____
_____	Overview of System Planning Process	_____
_____	Lunch	
_____	**Activity:** *System Development Planning* All co-trainers and facilitators will choose a team to work with during the planning process. Lead Trainer will be available to help trouble shoot and answer specific questions	_____
_____	Wrap-up and Evaluation	Lead Trainer
_____	Optional Training: Administering the Helpful Entry Level Skills Checklist *(Module 5)* **Activity:** Completion of the HELS-R Checklist	_____
_____	Adjourn Trainers will stay to debrief on the day's activities	



Project STEPS

Sequenced Transition to Education in the Public Schools

Dear

This letter comes to confirm your registration for the Project STEPS training session on "Developing A Community Wide Transition System Using the STEPS Model." To help prepare you for the workshop, I have enclosed a copy of the *Project STEPS Orientation Packet* and the training agenda. It will be helpful if you can take some time to review the material prior to the training.

When you come to the workshop, you will be receiving a number of resources that will facilitate transition system development in your community. We will also be embarking on many adventures together. Comfortable clothing is a must.

I look forward to meeting you. Please feel free to contact me should you require assistance or further information.

Sincerely,

Human Development Institute • 126 Mineral Industries Building • University of Kentucky
Lexington, KY 40506-0051 • 606-257-9115 • Fax: 606-257-4353

Training Worksheet

- ❑ Determine participants
  build a local team that includes, at a minimum, representatives from Part H, Part B, Head Start and family members

- ❑ Determine training needs & costs
  for materials, AV equipment, travel for participants

- ❑ Determine size
  # of participants/teams - it is recommended that no more than four teams be trained at one time

- ❑ Arrange for meeting and breakout rooms & sleeping rooms for participants

- ❑ Plan room set-up (see training logistics)

- ❑ Assemble all Project STEPS materials for participants

- ❑ Copy all handouts, agenda, evaluation form

- ❑ Send confirmation letter, *Project STEPS Orientation Packet* and training agenda to participants at least 2 weeks prior to training

- ❑ Make overheads

- ❑ Prepare name tags, sign-in sheet

- ❑ Make sure you have masking tape, scissors, markers, post-it notes, overhead markers, etc.

- ❑ HINT - Save your back and mail training materials ahead of time

Project STEPS
Developing A Community Wide Transition System

Training Objectives

Participants will:

- *be provided with opportunities to build their capacity to work as a team;*
- *assess the transition needs of their community;*
- *be given an opportunity to discuss current barriers to effective transitions;*
- *be given information on strategies to facilitate transition for administrators, staff, families, and children;*
- *be provided with information and materials that can be used in planning for the development of a community wide system for transition;*
- *understand the four STEPS model components and how they are integrated into community wide transition system design.*

Agenda

Day 1

8:30	Registration
9:00	Introduction/Training Agenda Overview
9:30	The Transition System Development Process (Module 1)
11:30	**Lunch**
1:00	Team Building/Effective Meetings (Module 2)
3:00	Break
3:15	Assessment of Current Transition Practices (Module 3, Section 1)
4:30	Adjourn

Day 2

8:30	Administrative and Interagency Issues (Module 3, Section 2)
10:00	Break
10:15	Administrative Planning
11:45	**Lunch**
1:00	Staff Involvement Issues & Planning (Module 3, Section 3)
2:15	Break
2:30	Family Involvement Issues & Planning (Module 3, Section 4)
3:45	Child Preparation for the Next Environment Issues & Planning (Module 3, Section 5)
5:00	Adjourn

Day 3

8:30	Overview of Priority Setting (Module 5)
9:00	Prioritization Activity
9:15	Overview of System Planning Process
10:45	Transition Break
11:00	System Development Planning in Teams and Lunch Break
2:00	Team Reports
2:30	Wrap-Up, Evaluation & Adjourn
2:45	Administering the Helpful Entry Level SkillsChecklist (Module 4) - OPTIONAL
4:15	Optional Training Wrap-Up, Evaluation & Adjourn

Developing A Community Wide Transition System Using the STEPS Model

EVALUATION FORM

A. Background

AGENCY

_____ Public School _____ Head Start

_____ Early Intervention _____ Child Care

_____ Family Member _____ Health

_____ Other _____

B. Rating

This section asks you to evaluate the workshop you attended. Please rate each session by circling from 5 (excellent) to 1 (very poor).

1. The organization of the presentation was:

very poor		average		excellent
1	2	3	4	5

2. The pace of the training was:

very poor		average		excellent
1	2	3	4	5

3. The presentation style used was:

very poor		average		excellent
1	2	3	4	5

4. The opportunities for questions/discussion were:

very poor		average		excellent
1	2	3	4	5

5. The adequacy of written materials was:

very poor		average		excellent
1	2	3	4	5

6. The clarity of the information presented was:

very poor		average		excellent
1	2	3	4	5

7. Overall Workshop Rating:

very poor		average		excellent
1	2	3	4	5

C. Objectives

Please indicate the level at which the major objectives of the training were accomplished. Participants were:

1. Provided with opportunities to build capacity to work as a team:

not		somewhat		completely
1	2	3	4	5

Comments: _____

_____

2. Provided with the opportunity to assess the transition needs of the community:

not		somewhat		completely
1	2	3	4	5

Comments: _____

_____

3. Given an opportunity to discuss barriers to effective transition:

not		somewhat		completely
1	2	3	4	5

Comments: _____

_____

4. Given information on strategies for facilitating transition for administrators, staff, family & children:

not		somewhat		completely
1	2	3	4	5

Comments: _____

_____

5. Given opportunity to plan activities that can be implemented within their community:

not		somewhat		completely
1	2	3	4	5

Comments: _____

_____

Please Continue on Back

D. Comments

1. I really liked:

2. The workshop could be improved by:

3. Additional Comments:

E. Additional Information

1. Were the training facilities satisfactory?

   _____ Yes _____ No

   Comments:

Thank You!

Guidelines for Observation and Discussion

Please use the following guidelines during your observation of the team activity.

Team: _____ Planning Time: _____ Assembly Time: _____

1. Check the types of working styles used to complete the activity?
   - ☐ cooperative (working side by side)
   - ☐ coordinated (going along with decisions made by one or few)
   - ☐ collaborative (decisions made together)

   Comments:

2. Was everyone involved in the completion of the project? ☐ Yes ☐ No

   Comments:

3. Was there evidence of a formal leader?
   ☐ Yes ☐ No

   Comments:

4. Did conflict or disagreement arise during the activity? ☐ Yes ☐ No

   Comments:

5. Was there a systematic approach to problem solving and conflict resolutions in evidence?
   ☐ Yes ☐ No

   If yes, was it:
   - ☐ Ignored
   - ☐ Smoothed
   - ☐ Suppressed
   - ☐ Compromised
   - ☐ Worked through

   Comments:

6. What decision making methods did the group use to determine roles and responsibilities with the project?
   - ☐ Formal leader
   - ☐ Majority rule
   - ☐ Unanimous
   - ☐ Powerful Minority (Clique)
   - ☐ Consensus

   Comments:

7. Which of the following best describes communication?
   - ☐ Clear and understood by all
   - ☐ Much noise but confused
   - ☐ Only a few communicated with each other

   Comments:

8. Which of the following best describes the group's attitude during the activity?
   - ☐ Frustrated
   - ☐ Challenged
   - ☐ Bored

   Comments:

STEPS Sign In Sheet

Training Date: _____ **Location:** _____

Name/Agency	Address (Street, City, Zip)	Phone/Fax (Include Area Code)	# of Children Served	MODULES Initial Each One Attended				
				1	2	3	4	5

Distribution of Project STEPS Materials

It is our desire to distribute our materials as far as possible. To do this, we strive to provide high quality materials at the lowest cost possible. The cost of our materials covers duplication and dissemination costs (production, shipping and handling) only. If you should find the cost prohibitive, we will work with you to negotiate a discounted price.

Copying Privileges

As per the U.S. Copyright Act of 1976, 17 USC 107, Doctrine of Fair Use, you may feel free to make a single copy of any page, chapter, table or diagram for use in training or for teaching purposes.

If you wish to copy any of our products for a specific purpose, please contact our office and we can negotiate copyright release. In order to release copyright, we will need several items specifying which of the documents and their parts you wish the release to apply to. Please check to see that you include:

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- Exact material to be duplicated and exact description (i.e., text, soundtrack, frame numbers if film, filmstrip or slides)
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It is important that you be very complete and specific in your information and that you allow sufficient time for permission to be granted. Please include a signature line for the permission at the bottom of your letter. Enclose two copies of your letter and a self-addressed envelope. Inquire as to what fees, conditions or restrictions will be imposed.

Some of the products that you may fell free to copy include: Project STEPS Orientation Packet, the HELS-R Manual (Helpful Entry Level Skills - Revised) and any overhead masters.

Ordering Information

In order to facilitate the purchase of materials for individuals or agencies, Project STEPS will provide:

- Sample products for review prior to purchase
- Substantial discounts for "bulk" orders
- Substantial discounts for training purposes
- A 10% discount to persons who have attended STEPS model trainings

PROJECT STEPS BIBLIOGRAPHY

DEVELOPING A TRANSITION SYSTEM

SEQUENCED TRANSITION TO EDUCATION IN THE PUBLIC SCHOOLS: PROJECT STEPS REPLICATION MANUAL (REV. ED.)

Byrd, M.R., Stephens, P., Dyk, L., Perry, E. & Rous, B. (1991)

This manual describes the process involved in establishing a community wide system for transition of young children using the STEPS model. The manual includes an overview of transition and interagency collaboration and a description of how to develop and implement a transition system that addresses administration, staff involvement, family involvement and child preparation for transition.

ASSESSMENT OF CURRENT TRANSITION PRACTICES/TRANSITION SYSTEM DEVELOPMENT PLAN

Rous, B. (1997)

This form allows the interagency community team to assess the current status of their transition system and provides a mechanism for developing a plan of action for transition system development based on targeted activities, dates initiated and completed and persons responsible. The transition scope, community vision statement and agencies involved in the plan development are included. Areas covered include interagency structure development, administration, interagency councils, staff involvement, family involvement and child preparation.

FACILITATION PACKET FOR THE DEVELOPMENT OF A SYSTEM FOR THE TRANSITION OF YOUNG CHILDREN AND THEIR FAMILIES

Rous, B. & Stephens, P. (1992)

This packet provides information for state and communities in system development for transition of young children. Key areas addressed include child find, evaluation and assessment, eligibility, IFSP development, placement meetings and others.

LOCAL INTERAGENCY COUNCIL STARTER KIT

Stephens, P & Rous, B. (1991)

This document was designed to help local communities form a local interagency council. It includes general information on the purpose and background of local interagency councils in the state of Kentucky (called Preschool Interagency Planning Councils or PIPCs) and a kit that provides information on how to establish and maintain a council in your community.

DEVELOPING A COMMUNITY WIDE TRANSITION SYSTEM: SAMPLE PACKET

Mullins, B. & Rous, B. (1992)

Sample transition procedures and products from local communities. This product is available upon request.

FAMILIES

ACCESS: A Guide to Supplemental Services for Families of Young Children (rev. ed.)

Byrd, M.R., Templar, J., & Rous, B. (1991)

This generic guide provides information for families of young children on how to access supplemental services within the community in areas such as food, expenses, medical, recreation, respite, dental, etc.

Families and the Transition Process: Primary Style

A guide for helping families prepare for the transition to a primary program.

CHILD PREPARATION AND ADJUSTMENT

Helpful Entry Level Skills Checklist - Revised

Byrd, M.R. & Rous, B. (1991)

This programming assessment was designed to aid transition of children ages 3-6. An observational assessment, it addresses social, behavioral and functional skills in the areas of classroom rules, work skills, communication, self-management and social behavioral.

Helpful Entry Level Skills Checklist Users Manual - Revised

Byrd, M.R. & Rous, B. (1991)

This manual provides information and instructions for using the Helpful Entry Level Skills Checklist - Revised.

Instructional Strategies Manual for the Helpful Entry Level Skills Checklist - Revised (rev. ed.)

Byrd, M.R. & Rous, B. (1991)

This manual is used in conjunction with the Helpful Entry Level Skills Checklist - Revised. It gives samples of strategies and activities that can be used to facilitate the acquisition of skills assessed through the checklist.

Developmental Ages for Skills Included on the Helpful Entry Level Skills Checklist

Hemmeter, M.L. & Rous, B. (1992)

This manual was developed to be used in conjunction with the Helpful Entry Level Skills Checklist to help identify "typical" developmental levels or ages for each skill addressed on the checklist. The manual includes developmental ages from three to six.

Transition Goal Catalogue for the Helpful Entry Level Skills Checklist

Rous, B. (1991)

A catalogue of sample objectives for each skill identified on the Helpful Entry Level Skills Checklist - Revised.

Transition Skills Matrix

Rous, B. (1991)

Classroom matrix for use with the Helpful Entry Level Skills Checklist - Revised.

TRAINING

PROJECT STEPS TRAINING MANUAL (REV. ED.)

Rous, B. (1997)

This training packet provides overhead and handout masters needed to train communities on establishing community wide transition systems using the STEPS model. *Distribution is limited.*

UNIVERSITY PACKET

Rous, B. (1991)

This packet provides information that can be used by university personnel to address transition issues in early childhood. It includes a script and overhead and handout masters.

CONTACT INFORMATION

PROJECT STEPS

Human Development Institute
University Affiliated Program
126 Mineral Industries Building
University of Kentucky
Lexington, Kentucky 40506-0051

BETH ROUS, PI/DIRECTOR

(606) 257-9115 • Fax: (606) 257-4353
brous@ihdi.uky.edu

World Wide Web Home Page Address:
http://www.ihdi.uky.edu

PROJECT STEPS PRODUCT ORDER FORM

ID	PRODUCT	PRICE	BULK RATE	QTY	TOTAL
PS01	ACCESS Manual	$3.00	over 20 $1.00		
PS02	Assessment of Current Transition Practices/ Transition System Development Plan	$3.00			
PS03	Developmental Ages	$2.00			
PS04	Facilitation Packet	$15.00	over 10 $12.00		
PS05	Families and the Transition Process: Primary Style	$3.00	over 20 $1.25		
PS06	Helpful Entry Level Skills Checklist - Revised	$1.00	25 for $10.00		
PS07	Helpful Entry Level Skills Checklist Users Manual	$1.00			
PS08	Instructional Strategies Manual	$10.00	over 10 $5.00		
PS09	Local Interagency Council Starter Kit	$2.00			
PS10	Project STEPS Replication Manual	$10.00	over 10 $5.00		
PS11	Project STEPS Training Manual *(limited distribution)*	$50.00			
PS12	Project STEPS Training Module Handout Notebook	$25.00			
PS13	Transition Goal Catalogue	$5.00			
PS14	University Packet	$3.00			
				TOTAL	

All prices include shipping and handling. A $5.00 minimum charge will be added to Express Orders.
All prices are subject to change.

BILL TO:

Name: _____

Agency: _____

Address: _____

_____

City: _____

State: _____ Zip: _____

Phone: _____ Fax: _____

SHIP TO:

Name: _____

Agency: _____

Address: _____

_____

City: _____

State: _____ Zip: _____

Phone: _____ Fax: _____

PAYMENT METHODS:

Check Enclosed: _____
Make checks payable to Project STEPS

Purchase Order: _____

For information about orders, please contact Larry Jarrard at 606-257-9117.

MAIL OR FAX ORDER TO:

Project STEPS Dissemination Center
Human Development Institute
202 Mineral Industries Building
University of Kentucky
Lexington, KY 40506-0051
Fax: 606-257-4353

"Developing A Community Wide Transition System Using the STEPS Model"

Overhead Masters

Project STEPS

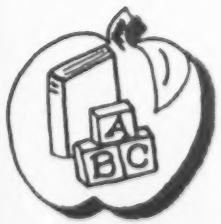
Sequenced

Transition to

Education in the

Public

Schools



National STEPS Outreach

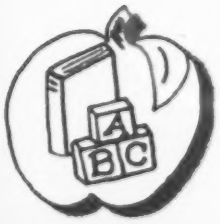
- Housed at the Human Development Institute - University of Kentucky
- Supported through Federal and State Funds
- Replicated across the U.S.
- State, Regional and Local Level Implementation

What is Transition?

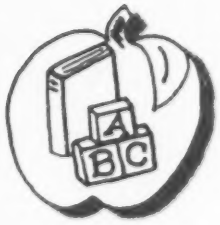
Movement or CHANGE from one environment to another.

Types of Transitions

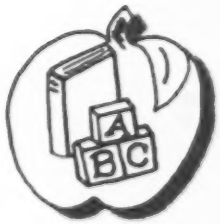
- Program
  - Hospital to home
  - Early intervention to preschool
  - Homebased to center based
  - Preschool to primary
  - Private to public
- Curriculum
- Philosophy
- Teacher



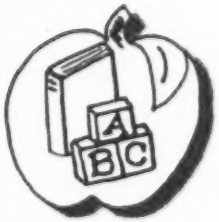
Transition is unavoidable.



Transition is a process, not an event.

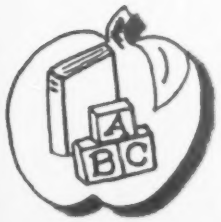


Transition involves collaboration with other providers.



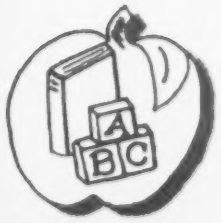
Coordination & Collaboration

- Coordination
  - Agreeing to the decisions of others, or
  - "To bring into proper order or relation; adjust"
- Collaboration
  - Making decisions together, or
  - "To work together"



Key Issue to Remember

- Transition involves an interagency system that assesses the transition needs of the whole community, while ensuring through interagency policy and procedure development, the successful movement of children and families between and among agencies.

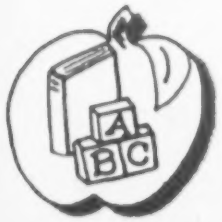


Components of Transition Systems

- Developing Vision & Commitment
- Establishing Administrative Structure
- Training & Technical Assistance
- Family Involvement
- Child Preparation & Adjustment
- Monitoring & Evaluation

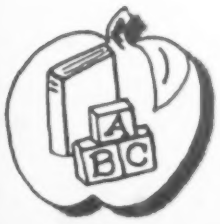
Guiding Principles in Systems Development

- Vision drives the system, not legal requirements
- Integrates with existing structures & systems
- Keep it simple. Comprehensive & effective, not elaborate
- Resolving "old" needs & problems may create new ones



Where to Start

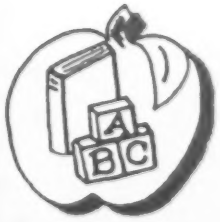
- Understand the current issues
- Define your vision
- Assess your needs and present state



Activity:
Identify Current Issues and Barriers

- For the next five (5) minutes, each team member should generate a list of issues or barriers to effective transition within your community

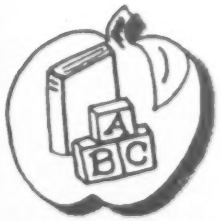
- As a team, discuss & combine the issues into similar categories & post them on the flip chart paper behind you



Activity:
Crafting a Vision Statement

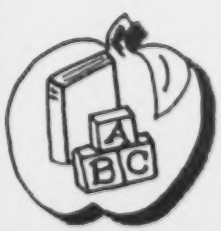
- Generate desired characteristics for:
  - Children, families, direct staff, administrative staff/entities

- Do not try to make a coherent statement, but rather single words and short phrases



In This Section We Will Cover

- Effective Teams and Stages of Team Development
- Developing An Administrative Structure
- Effective Meeting Strategies



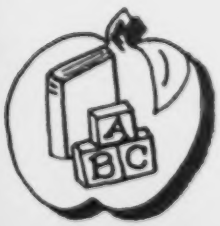
What is a Team?

A group of individuals who are interdependent and have the ability to use effective strategies to accomplish a common goal or objective.

Effective Teams

- Structure
- Discipline
- Challenge
- Synergy
- Understanding
- Methodology
- Goals
- Output
- Support
- Fulfillment

Adapted from
Francis & Young, 1992



Essential Components of Effective Teamwork

- Shared goals & objectives
- Clearly defined roles
- Consistent involvement of team members
- Open communication between team members
- Authority of the team to make decisions

Essential Components of Effective Teamwork

- Attention to the meeting process as well as content
- Trust between team members
- Mutual respect
- Methodology for problem solving & conflict resolution

Adapted from
Rees, 1991

Stages of Team Development

- Stage 1 - Questioning
- Stage 2 - Determining Structure
- Stage 3 - Organization
- Stage 4 - Maturity

Adapted from
Francis & Young, 1992

Stages of Team Development

Adapted from Francis & Young, 1992; Hansen & Marburger, 1989

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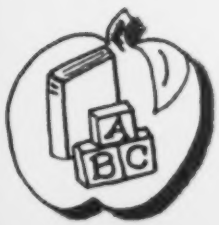
Developing an Interagency Structure

- Structure for operation & participation
- Authority for:
  - Committee decisions
  - Decisions affecting agencies
- Decision making process
- Complaint resolution & problem solving



Developing an Interagency Structure

- Authority for funding decisions
- Meeting logistics & strategies
- Leadership structure
- Social opportunities
- Priority setting

Before the Meeting

- Determine purpose, location & length of the meeting
- Prepare copies of the agenda
- Designate a chairperson or facilitator
- Gather the necessary materials
  - Flip chart, index cards, handouts, markers/tape, refreshments

The Meeting Environment

- Set up space for visibility
- Provide sufficient work space for team members
- Minimize distractions
  - Noise
  - Temperature
  - Interruptions

Recording Group Work

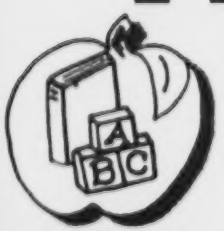
- Record ideas and discussions using a group recording process (flip chart, story boarding)
- Rationale and purpose
  - Display group decisions, minimize off task discussions, get consensus, serve as group notes, evaluate progress

Recording Group Work

- Recording Techniques
  - Summarize main points
  - Verify content
  - Use bullets or colors
  - Number the charts

During the Meeting

- Start on time
- Introductions/Role clarification
- Agenda overview
- Set time limits, if applicable
- Discussions (Present, Review, Discuss, Decision)
- Review all decisions
- State next steps
- End on time



Brainstorming Steps

- Narrow the topic
- Set time limit
- Designate roles
- Begin/End session
- Clarify/Consolidate
- Filter for feasibility
- Make decisions

Brainstorming Rules

- There should be no criticism of other's ideas
- All ideas should be encouraged and built upon
- Go for quantity, not quality
- Continue until time is called
- No discussion or sidebars

Groundrules for Discussion

- All team members come prepared
- Listen to other team members
- Be involved in the discussions
- Respect other's opinions & points of view
- Provide alternative points of view or opinions
- Never argue facts (look them up)

Barriers to Effective Discussions

- Too many talkers
- Refusing other points of view or positions
- Arguing or criticism
- Interruptions, preoccupation, poor environments
- Mental or physical fatigue

Decision Making

- Default
- Authority
- Clique
- Majority
- Consensus

Games Team Members Play

- Not completing assignments
- Blaming others; rationalizing failure
- No reception to other opinions
- Focusing on minor issues/blemishes
- Using job responsibilities as an out
- Taking a pessimistic view
- Taking on "the world"
- Setting others up for failure

Promoting Equal Partnerships

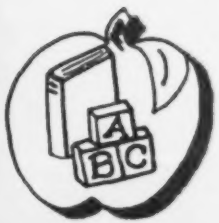
- Teams don't obtain equal input from team members because:
  - History
  - Conformity
  - Participation
  - Understanding

In This Section We Will Cover

- Assuming Responsibility
- Developing Transition Procedures
- Facilitating Communication
- Maintaining Staff Involvement

Assume Responsibility

- Identify agencies and services available within the community
  - Identify agency specific information
    - Services
    - Eligibility
    - Fees
    - Population served
    - Philosophy



Assume Responsibility

- Identify single contact person in each agency
  - Identify contact for staff, families and administrators
  - Provide information on channels of communication

Develop Procedures

- Negotiate and identify transition timelines
  - Identify current agency timelines
  - Negotiate a schedule for annual
    - Evaluation and monitoring
    - Goal setting

Develop Procedures

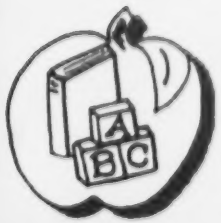
- Negotiate procedures for the Transition Conference
  - Assess current status
  - Negotiate procedures
    - General procedures
    - Staff roles
    - Family roles

Develop Procedures

- Negotiate procedures for the referral
  - Assess current status
  - Negotiate procedures and timelines
    - Prescreening committee

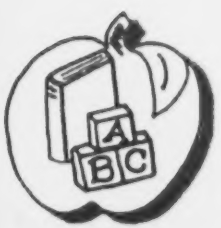
Develop Procedures

- Negotiate procedures for the evaluation process
  - Assess current status
  - Negotiate procedures and timelines
    - Sharing of evaluations
    - Securing additional data
    - Notifying families
    - Scheduling and sharing results



Develop Procedures

- Negotiate procedures for the IFSP/IEP Meetings
  - Assess current status
  - Negotiate procedures and timelines
    - Scheduling
    - Attendees and roles
    - Pre-meeting activities
    - Meeting agenda



Facilitate Communication

- Negotiate procedures for ensuring follow-up on children
  - Assess current status
  - Negotiate procedures and timelines
    - Types of activities
    - Participants and roles
    - Role of families

Maintain Involvement

- Identify staff concerns and needs related to transition
  - Negotiate procedures and timelines
    - Method of information collection
    - Identify areas of consistency

Maintain Involvement

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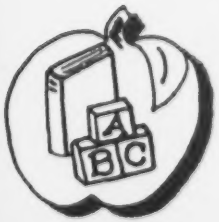


In This Section We Will Cover

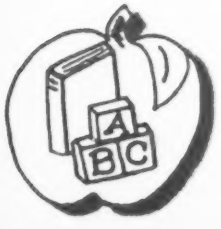
- Inservice Training
- Enhancing Communication
- Staff Involvement In Procedures
- Staff Involvement in Preparing the Child

Inservice Training

- Plan and conduct joint inservice training for sending and receiving agency staff
  - Review staff concerns and needs
  - Determine topics to be covered through inservice training
    - Regulations, agency operation and funding, placement options, due process, staff roles
  - Determine need for written material

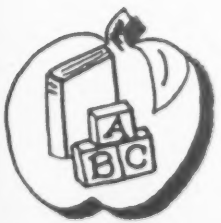
Enhancing Communication

- Facilitate communication among sending and receiving agency staff
  - Cross program visitation
    - Scheduling, rational and support
  - Additional opportunities
    - Joint training, joint curricula, use of technology, follow-up packets



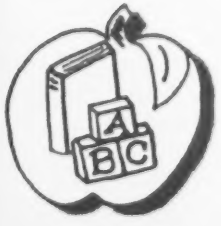
Staff Involvement in Procedures

- Outline procedures for staff involvement in transition policies and procedures
  - Transition Conference
  - Referral
  - Evaluation
  - IFSP/IEP Meetings
  - Follow-up activities



Preparing Children

- Staff identify and assess skills needed in the next environment using a systematic process
  - Assess the current literature
  - Obtain permissions
  - Identify specific skills to the community
  - Develop format

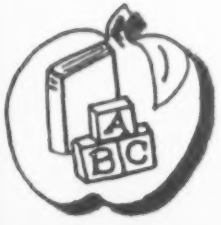


Preparing Children

- Staff use developmentally appropriate strategies to provide instruction on skill identified
  - Provide opportunities and support for the development of instructional strategies
    - Strategies, activities, adaptations

In This Section We Will Cover

- Awareness of Programs
- Addressing Family and Child Needs

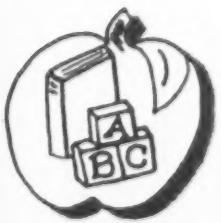


Awareness of Programs

- Develop options for increasing family awareness of laws and regulations
  - Plan meetings to discuss program differences
    - Knowledgeable speakers
  - Develop a list of advocacy experts
  - Secure written information
  - Use consistent terminology

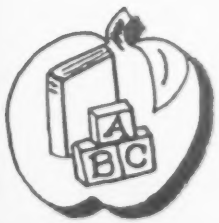
Awareness of Programs

- Outline procedures for including families in due process procedures
  - Transition Conference
  - Referral
  - Evaluation
  - IFSP/IEP Meetings
  - Follow-up activities



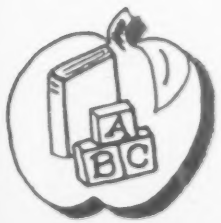
Awareness of Programs

- Provide families with a variety of options for gaining knowledge
  - Group meetings
  - Support groups
  - Individual opportunities
  - Video-tapes, interactive sites
  - Newsletters
  - Program visitation
  - Written information



Addressing Family and Child Needs

- Provide information and strategies to assist families in preparing the child
  - Share information on functional skills
    - Include families in the evaluation process
    - Secure input into targeting skills
    - Provide strategies for home environment

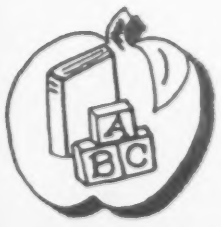


Addressing Family and Child Needs

- Develop procedures for linking families to supplemental services
  - Generic resource manual development
    - Family initiation
    - Information on communication skills
    - Staff follow-up

In This Section We Will Cover

- Entry Level Skills
- Individual Transition Planning for Each Child

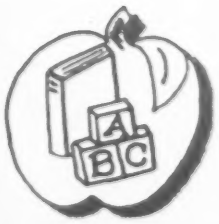


Entry Level Skills

- Develop procedures for systematically identifying skills children need for transition
  - Conducting the assessment
  - Staff and family involvement
  - Sharing of information

Entry Level Skills

- Develop methods for targeting skills and strategies for incorporating them into the classroom environment
  - Targeting skills based on programs
  - Use of instructional strategies
  - Opportunities for specific transition activities
    - Program visitation



Individual Transition Planning

- Develop procedures and methods for incorporating a transition plan on the IFSP/IEP
  - Target transition goals on IFSP/IEP
    - Method for selection and merging of goals
  - Program planning for other children

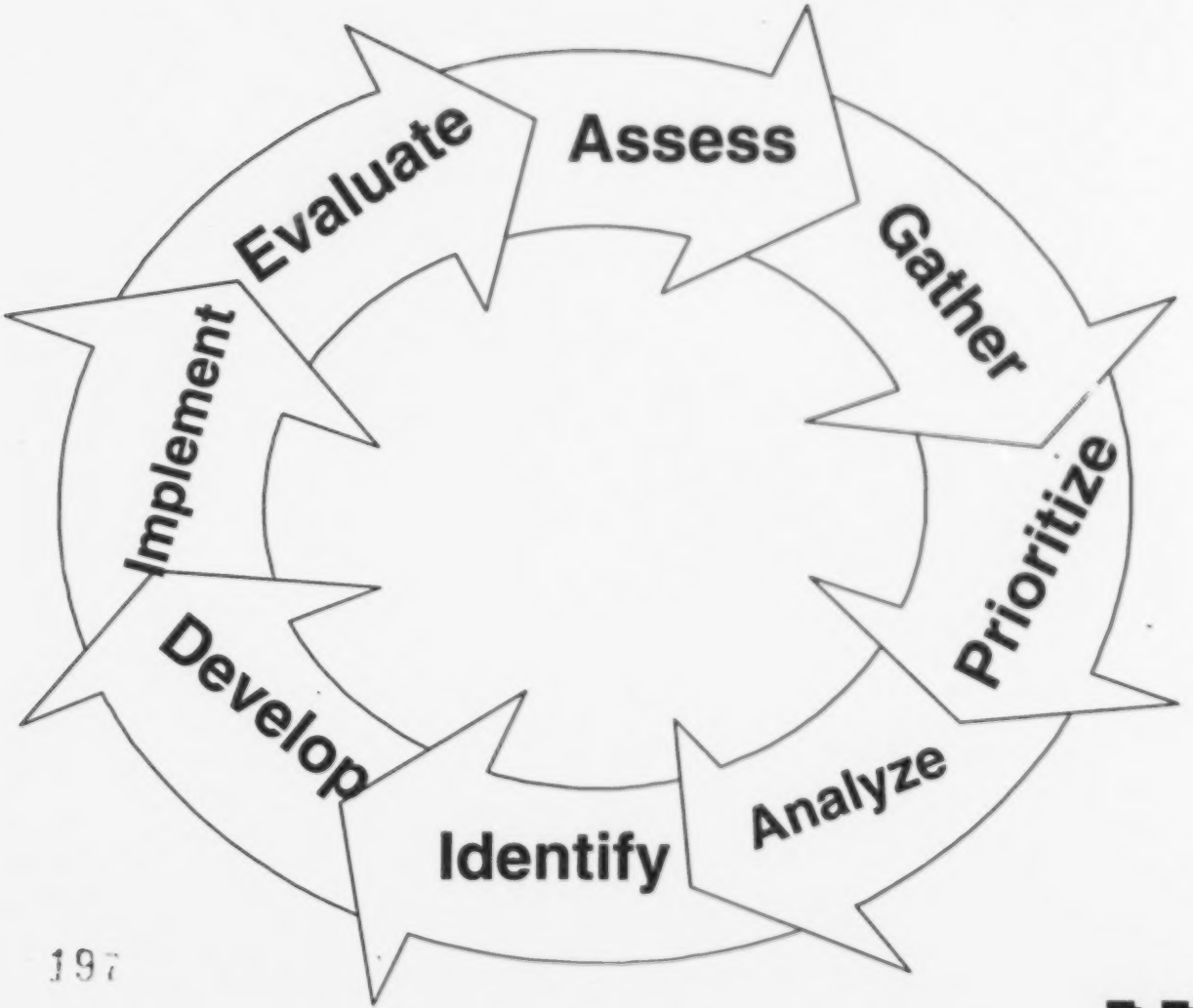
Individual Transition Planning

- Develop and implement procedures for insuring follow-up on children making the transition
  - Procedures for information included in the follow-up packet
  - Sharing of information
  - Longitudinal follow-up

Setting Priorities
Dotting & Weighting

- 1st priority — 4 points
- 2nd priority — 3 points
- 3rd priority — 2 points
- 4th priority — 1 point

The Planning Cycle

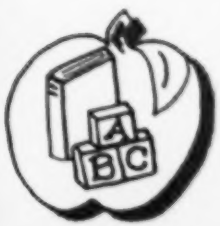


Analyzing Issues and Problems

- State the problem or issues
- Determine where, when, to what degree the problem occurs
- Identify strategies
  - Brainstorm ideas
  - Determine feasibility

Transition Team Work Plan Overview

- Need Statement
  - What is the problem?
- Expected Outcomes
  - What will be in place after the team completes the work?



Transition Team Work Plan Overview

- Expected Impact
  - What change will occur; how will it change the current transition system?
- Stakeholders/Method of Involvement
  - How will staff, families and administrators be involved?

Transition Team Work Plan Overview

- TA Resources
  - What resources are available to assist the team (federal, state, regional, local)?
- Evaluation of Outcomes
  - How will the team evaluate to determine if the problem has been sufficiently addressed?

Transition Team Work Plan Overview

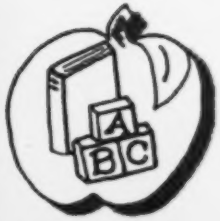
- Action Plan
  - For each problem statement, the team should identify the specific activities (steps) and timelines needed to address the problem

Helpful Entry Level Skills Checklist

- Purpose
  - Facilitate transition
  - Focus on functional vs. academic skills
  - Representative sampling from 1st grade, Kindergarten and Preschool staff
  - Systematic approach

Helpful Entry Level Skills Checklist

- Rationale - Research Shows
  - Failure after kindergarten result of social/behavioral deficits
  - Likelihood of successful inclusion with appropriate social/behavioral skills



Helpful Entry Level Skills Checklist

- Classroom Rules
- Work Skills
- Communication Skills
- Social Behavioral Skills
- Self Management Skills